IMPLEMENTATION AND ONBOARDING PROCESS

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The main activities in the onboarding process are as follows.

1.   Kickoff Meeting:

This initial stage is led by the Business Development team.It serves as an introduction to the client and their project.During this phase, stakeholders, such as approvers and decision-makers, are identified. Communication channels with these stakeholders are established, ensuring effective project communication and management.

2.   Requirements Gathering:

In this stage, the focus is on defining the specific requirements for the service or process. Detailed requirements are documented, providing a clear understanding of what needs to be delivered.This stage lays the foundation for the subsequent development phases.

3.   System Development:

System development encompasses various activities.It begins with application design and the creation of customized features to meet the defined requirements.Configuration settings are established, and user interfaces (UI) and overall design are developed.This phase transforms requirements into a tangible software system.

4.   User Acceptance Testing:

Before moving to the live environment, the customized software undergoes rigorous testing.User Acceptance Testing (UAT) is conducted to ensure that the system functions as intended and aligns with the acceptance test plan.Any issues identified during this phase are addressed to ensure system readiness.

5.   Quality Assurance:

Quality Assurance (QA) is a critical step to ensure the software meets quality standards. The QA team conducts thorough tests to identify and rectify any defects or issues. This phase is crucial for delivering a robust and reliable solution.

6.   Training:

Users and technical staff receive training during this stage.It equips users with the knowledge and skills needed to effectively utilize the system.Technical training ensures that support and maintenance can be carried out proficiently.

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7.   Set Up for Live:

This phase involves final preparations before the system goes live.Validations are performed on processes, payments, outputs, user profiles, permissions, and user manuals.These validations help ensure that everything is in place for a successful launch.
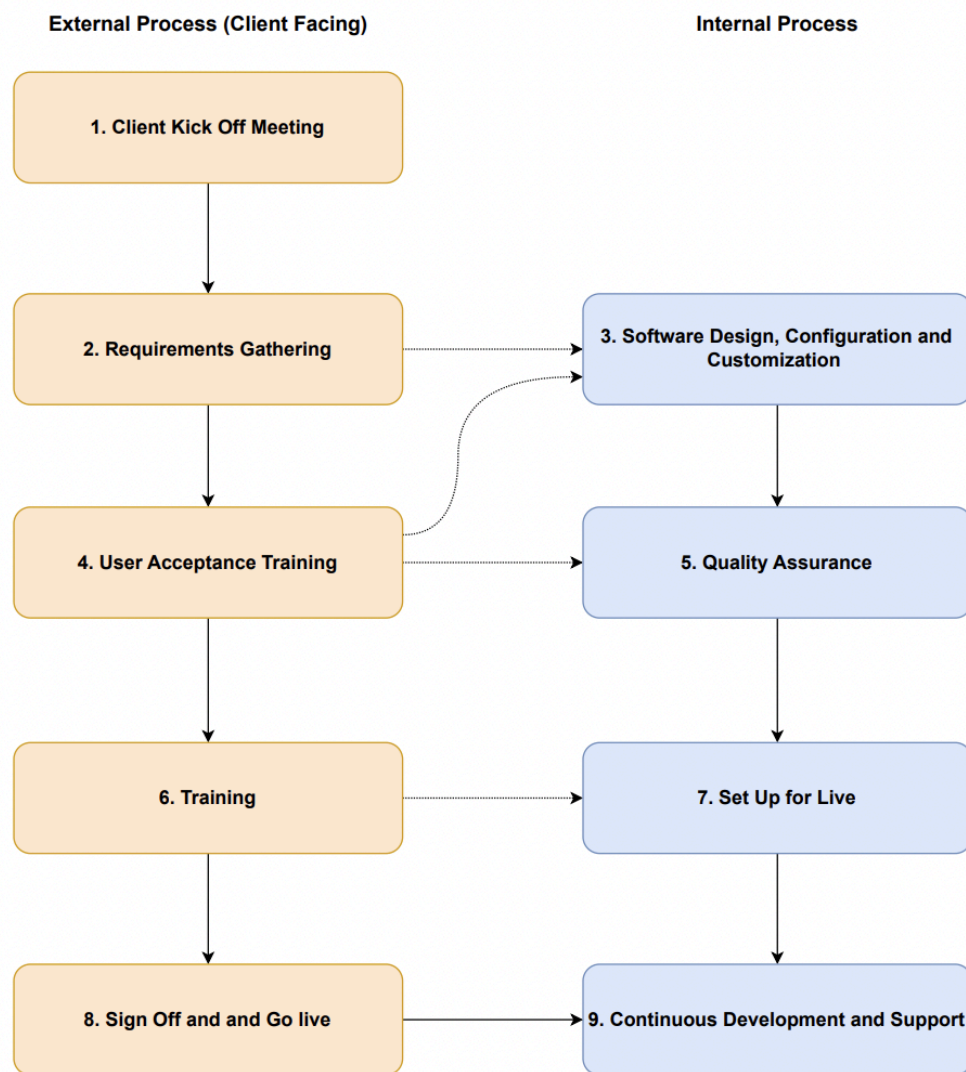
8.   Sign Off and Go Live:

Once all requirements are met and the system is ready, the client and relevant stakeholders provide their formal approval (sign-off) for the system to go live. This stage marks the transition from development to live operations.

9.   Post Implementation Support:

After the system is live, ongoing support and maintenance are essential.Post-implementation support ensures that any issues, updates, or enhancements are addressed promptly.This phase helps maintain the system's performance and reliability over time.

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IMPLEMENTATION OR ONBOARDING PROCESS

External Process (Client Facing)

Internal Process

1. Client Kick Off Meeting

2. Requirements Gathering

3. Software Design, Configuration and Customization

4. User Acceptance Training

5. Quality Assurance

6. Training

7. Set Up for Live

8. Sign Off and and Go live

9. Continuous Development and Support

Requirements Gathering

These activities are focused on gathering requirements and project planning. The objective of the project definition phase is to create a shared understanding of how the application in question will work to satisfy the client.

Analysis of the business and technical requirements play a key role in determining

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the overall complexity and scope of the project. The types of requirements that will be gathered, analyzed, and documented during this process may include some or all of the following:

- User Requirements
- System Requirements
- Functional Requirements
- Non-functional Requirements

Approach for Requirement Gathering

Implementation representatives will meet with the clients to arrive at a shared understanding of their operations and to define the required systems behavior and integration to existing systems.

Requirements definition is performed with a variety of standard tools and information sources. We apply questionnaires and conduct interviews with key personnel to gather requirements

These interaction could involve questions regarding but not limited to the following:

- Study of the existing processes and systems, if any, and challenges faced by the user
- Process workflows and mapping
- Detailing of data and state of any pre-existing data and if there is a need for migration.
- Consideration for any legal aspects, operations guidelines that to mitigate the legal risk associated with the system automation and migration

The participation of senior personnel and business process owners is critical to the completion of this process and the project in general. The quality of the deliverables is based on the feedback, knowledge and experience of the participants; therefore, participation of the right personnel is vital.

Deliverables

The implementation lead should deliver the following upon the conclusion of the Project Definition phase:

- Requirement's specification documents

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- Technology recommendation, covering the required technologies (hardware, network infrastructure, system software, and any other required third-party software) to implement the proposed business registration system.
- Quality document and project plan, including roles and responsibilities and schedule.

Software Design, Configuration and Customization

The System Requirements Specifications is used in the design and customization of the base applications software in order to meet the requirements as mutually agreed in the Business Requirements Specifications document. The project requirements determine the duration this exercise should take.

User Acceptance Testing/System Testing

This is a process done with the client in order to validate the effectiveness and efficiency of the requirements and design the developed product.The number and type of tests to be conducted will be decided and agreed upon by the project team.

The team conducts two types of tests

- Testing done at each developmental stage (component/module) • Final system testing.
- The above categories will comprise of the following types of tests.
- Functionality Testing
- Usability testing
- Interface testing
- Compatibility testing
- Performance testing
- Security testing

Quality Assurance

The implementation department's role in the quality assurance process is to provide

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requirements documentation to the QA team to ensure all products developed are within the acceptable standards internally and internationally. The team is also responsible for responding or fixing issues raised by the QA team

Training

The implementation team is responsible for knowledge transfer to the users who will be responsible for the use, support and maintain any application deployed.The training and capacity building exercise ensures that all roles and responsibilities as defined in the system are working accoringly, and the users knows how to navigate, trouble shoot and support the system deployed. Methods for delivery of trainings adopted are selected in collaboration with the user. The determining factors include the scope of a project, number of users and level of dispersion of the users. For every training feedback is collected from participants to assess the readiness of the user to go live.

The table below shows a few training methods that can be employed:

Training Method	Description
Bootcamp	Intensive and rigorous specialized technical training with users in a workshop away from the normal working environment
Presentations	Presentations will be the primary mode of training is used extensively to cover all the key concepts of a system and to explain the different concepts related to system operations. A copy of the presentation slides is included in the training material provided to all participants for future review.
System Demonstration	System demonstration is also adopted for users to have a practical look and feel of the actual experience they will have while using the system. The test environment setup is usually used for any system demonstration.

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Workbook Exercises	The training material includes may include worksheets with exercises modeled on case studies that will help participants understand the concepts better. Typically, these exercises will be group-based so participants can collectively discuss and complete exercises. At the end of the training, actual solution sheets are also provided, and participants are encouraged to attempt the exercises again for better understanding.
Training Material	The training material may comprises of any of the following items depending on the agreement with the client ● Presentation slides ● Workbook with exercises ● Short reference guide of How To Do's ● List of reference material for further study ● Besides these electronic copies of following will be made available to the user which can appropriately share with relevant staff as per their needs ● User Manuals ● Operations Manuals ● Video tutorials ● List of Reference material for further study ● An online Help Center resource ● Soft copies of training materials in flash disks

Go Live Set Up

The implementation team is responsible for ensuring the live environment is set up as per the Go live checklist adopted by Pesaflow. During this process final tests are conducted to ensure that the following aspects are correct;

- Domain name
- Process flow
- Payments
- Outputs
- Database(where applicable)
- Roles and permissions
- Alerts

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- Integrations etc

During this process the team also puts together and shared the following documents with the user.

Document	Containing
Installation guides	Detailed installation procedures

Operator user guides	Detailed operating and regular maintenance procedures for each system-specific function as well as an overview of the complete system
Quick reference guides	Single page documents describing the essentials of each system function as a sequence of simple ordered instructions
System administration guides	Detailed system-related information for the effective and efficient control and running of the system
Troubleshooting guides	Hardware and software diagnostic fault-finding information and a list of errors / resolutions
Manufacturers Manuals	Commercial off-the-shelf manuals as supplied by the various suppliers of any specialized equipment that may be in use

Sign Off and Go Live

When the project comes to a complemention, the implementation team is reposbilble for ensuring all sign of documents are signed.The sign off is according to the template agreed upon with the client.

One copy of the Sign-off Form to be kept by Pesaflow and a second copy is kept by the user for their record.

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Continuous Support and Development

When the project comes to a complemention, the implementation team is reposbilble for ensuring all sign of documents are signed. The team shall provide ongoing support for a period covering the Warranty Period and the Post-Warranty Services Period as per the agreed contractual obligations and in accordance with the specified maintenance requirements specification.

List of key documents prepared by during the implementation process

Document	Definition	
Requirements document Specification	User,function and non functional requirements of the system	
Customization Specification	Any customization required to standard or tailor-able elements of the solution	
QA System Test Specification	System-level tests to nsure that the system meets the functional requirements that are identified.	
Acceptance Test Specification	Acceptance test sign off to prove that the system meets the functional requirements defined	
Training Attendance and Feedback	Acknowledment that training was conducted and feedback partcipants Training Schedule	
System Sign Off	Confirmation that the project has been concluded.	

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Change Request	Once a system goes live, any requests submitted by the client that do not fall within the initial requirements specifications is submitted through a change request document. The contents of the document are similar to the requirements specification document.